

# Workiva Sync Installation Guide

This document is intended for IT teams to use to determine the appropriate installation method and provide instructions for installing Workiva Sync. To learn more about how Workiva Sync functions, please see the [Workiva Sync Overview](#).

**Workiva Sync is almost always centrally installed by the IT team who manages the Microsoft tenant.** Most Workiva customers disable their end users' ability to install add-ins from the Microsoft Appsource Marketplace (commonly referred to as the Microsoft Store).

- If centralized deployment of the Workiva Sync add-in is right for your organization, please see the "[Centralized IT Installation](#)" section of this document.
- If the business users needing Workiva Sync have the ability to search for, install and use Excel Add-ins that send and receive web requests from the Microsoft Appsource marketplace, please see the "[Direct User Install](#)" section of this document

**Note:** There is no .exe or .msi file to assist installing Workiva Sync. Workiva provides a manifest .xml file which can be added to Excel in non-Office-365 environments.

## Centralized IT Installation

Workiva Sync almost always needs to be centrally installed by the IT team that manages the Microsoft tenant. See Workiva's recommended centralized installation paths below:

- Office 365 enabled orgs: [Installation via Microsoft 365 Admin Center](#)  
**Note:** In a hybrid environment, the users' mailboxes must be in the cloud; they cannot belong to an on-premises Exchange instance.
- Non-365 enabled orgs: [Installation via side-loading the manifest file](#)

## Installation via Microsoft 365 Admin Center

1. Open the Microsoft 365 Admin center.
2. In the Admin center, go to the **Settings > Integrated apps > Add-ins** page.
3. Select **Deploy Add-in** at the top of the page, and then click **Next**.
4. Select **Choose** from the store.
5. On the "Select Add-in" screen, search for "Workiva Sync".
6. Select the Workiva Sync app and click **Add**.
7. On the "Configure Add-in" screen,
  - a. Select **Specific users/groups** and use the Search box to find specific users or groups who need access to Workiva Sync.
  - b. Select a deployment method. Workiva recommends using the "Fixed" deployment option.

8. Click **Deploy**.  
A green check (tick) mark appears when the add-in is deployed.
9. Follow the on-page instructions to test the add-in.
10. When finished, click **Next**. If you've deployed to just yourself, you can select **Change who has access to add-in** to deploy to more users.

For more detail on installing add-ins via the Microsoft 365 Admin center, please see the [Deploy add-ins in the Microsoft 365 admin center Microsoft Learn article](#)

## Installation via side-loading the manifest file

1. Open the [Workiva Sync manifest file](#) and save as a .xml file.
2. Copy/paste the manifest xml file to a shared drive location with read-only permissions.  
This must be shared drive that is a UNC path (your IT folks will know what that means). While it is possible for an Admin to create a shared folder with a UNC path on an end user's machine, this is considered a last resort.
3. Open **Excel > Options > Trust Center > Trust Center Settings > Trusted Add-in Catalogs**.
4. Ensure the "Don't allow any web add-ins to start" and the "Don't allow web add-ins from the Office Store to start" checkboxes are blank (unchecked).
5. Enter the file path to the shared drive location containing the manifest file into the Catalog URL field.  
**Important:** The file path *must* start with "//".
6. Click **Add to Catalog**.
7. Mark (check) the "Show in menu" checkbox for the Workiva Sync add-in address.
8. Click **OK** to save and close the Trusted Add-in Catalogs screen.
9. Close and reopen Excel.

For more detail on installing add-ins side-loading the manifest file, please see the [Sideload Office Add-ins to Office on the web Microsoft Learn article](#).

## Direct User Installation

End users who have the ability to search for, install, and use Excel Add-ins from the Microsoft Appsource marketplace that can send and receive web requests are able to install Workiva Sync by themselves by following the steps below:

1. Open Excel and select the **Insert** tab.
2. Click **My Add-ins**.
3. In the Office Add-ins window, click **Office Store**.
4. Type "Workiva" in the search box.
5. Select "Workiva Sync", and click **Add**.
6. Click **Continue**. Workiva Sync will be added to your Excel.

## Installation Requirements

### User Permissions

The user account performing the installation must be an administrator on the PC in question.

### Prerequisites

- Excel on iPad
- Excel on Mac (Microsoft 365)
- Excel 2016 or later on Mac\*
- Excel 2019 or later on Mac\*
- Excel 2016 or later on Windows\*
- Excel 2019 or later on Windows\*
- Excel on Windows (Microsoft 365)
- Excel on the web

For the best experience, Microsoft Office 365 integrated with the most recent desktop version of Excel is recommend.

### Excel 2016 and Excel 2019 Notes

**\*IMPORTANT:** Support for Excel 2016 and Excel 2019 is being discontinued on October 14, 2025, as Microsoft will no longer be supporting these versions.

Volume-licensed versions of Excel 2016 and Excel 2019 use IE11 as the integrated browser with no method of adjusting which browser is used. Additionally, certain versions of Excel 2016 and Excel 2019 use Microsoft Edge Legacy and requires the WebView2 to be installed. See [Workiva Sync Technical Details](#) for more information.

## FAQs

### Is Workiva Sync the same add-in as "Workiva Wdesk Sync"?

No. They are different applications. Workiva Sync is a web app add-in that communicates between Excel and Workiva via API calls. It replaced Wdesk Sync, which is discontinued.

### Is there an .exe or .msi file for installing Workiva Sync?

No. There are no installation files for Workiva Sync apart from the manifest file.

This difference in add-in type means that Workiva Sync follows a different installation path than Wdesk Sync. Workiva Sync can be installed through the Microsoft Appsource or by adding the app manifest .xml file location as a trusted add-in via the Trusted Add-in Catalogs screen. To install Workiva Sync centrally, the IT team that manages the Microsoft tenant will need to assist with the installation.

### What files are added to the end users machine when Workiva Sync is installed?

Installing Workiva Sync requires a 4kb [manifest file](#) to be added or referenced by the end user's machine. This manifest file tells Excel to add the Workiva Sync button to the Home toolbar ribbon in Excel, and when selected, opens the native browser panel in Excel and loads the Workiva Platform in the embedded browser.

Apart from the manifest file, there are no installation files for Workiva Sync .

### Do users need to log into Workiva Sync in order to use it?

Users are required to log into their Workiva Platform account before they can access the capabilities to sync data into the Workiva Platform.

## Resources

- [Workiva Sync Microsoft Appsource Page](#)
- [Workiva Sync App Technical Details](#)
- [Office Add-ins platform overview](#)
- [Determine if Centralized Deployment of add-ins works for your organization](#)
- [Deploy add-ins in the Microsoft 365 admin center](#)
- [Sideload Office Add-ins to Office on the web](#)
- [Browsers and webview controls used by Office Add-ins](#)
- [Microsoft Edge WebView2](#)
- [Office manifest file directory location: 3rd party Microsoft developer blog](#)